

Message Text

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ACTION EB-11

INFO OCT-01 NEA-10 ISO-00 CIAE-00 INR-10 NSAE-00 RSC-01

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E.O. 11652: N/A

TAGS: EAGR, TU

SUBJ: EFFECT OF ENERGY SITUATION ON AGRICULTURAL PRODUCTION
AND TRADE

REF A. FASTO CIR 296; B. STATE 5228

THIS MESSAGE UPDATES REF A AND PROVIDES DATA REQUESTED REF B.

SUMMARY. NO SUBSTANTIAL ADVERSE EFFECTS ON AGRICULTURAL PRODUCTION OR TRADE DURING 1974. HIGHER INPUT COSTS WILL CUT INTO NET FARM RETURNS BUT GOVERNMENT ACTION AND OTHER FACTORS COULD GIVE TURKISH EXPORTS NET COMPETITIVE ADVANTAGE. FOOD IMPORT REQUIREMENTS NOT EXPECTED AB BE SIGNIFICANTLY REDUCED BY HIGH WORLD PRICES AND DOMESTIC INFLATION. CURRENT NERVOUSNESS RE '74 AG OUTLOOK MAINLY REFLECTS CONCERN OVER CONDITIONS WINTER WHEAT AND DROUGHT PSYCHOLOGY. MODERATE ECONOMIC GROWTH SEEMS LIKELY DURING 1974. THE PRICE WILL BE FOREIGN EXCHANGE DRAWDOWN, BUDGETARY STRAINS AND HIGH INFLATION. AN ADDITIONAL AREA TO BE WATCHED FOR POSSIBLE DETERIORATION IS GROWING UNEMPLOYMENT, ESPECIALLY IF THERE IS A LARGE RETURN OF WORKERS FROM EUROPE. END SUMMARY

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1. GNP GAIN FORECAST TO OUTSTRIP INFLATION FOR MODERATE GROWTH. PERCENTAGE CHANGES FROM PREVIOUS YEAR FOLLOW:

1973 1974

CONSTANT PRICES 6.4 5
CURRENT PRICES 22.6 35

1973 PRELIMINARY OFFICIAL ESTIMATES, 1974 OUR BEST CURRENT
GUESSES UNDER UNCERTAIN CONDITIONS.

2. HIGH STOCKS AND FORWARD IMPORT CONTRACTS PLACE TURKEY IN
A STRONG FERTILIZER POSITION. CCALENDAR YEAR S AND D DATA IN
1.000 MT NUTRIENTS FOLLOW:

1972	1973	1974 FORECAST
ESTIMATE	1973	11 PERCENT
USE LEVEL	1973 USE LEVEL	

NITROGEN

STOCK	22	138	249	249
PRODUCTION	146	141	145	145
IMPORT	345	380	*66	106
SUPPLY	513	659	460	500
CONSUMPTION	375	410	410	450

PHOSPHATE

STOCK	32	54	71	71
PRODUCTION	133	105	135	135
IMPORT	88	130	62	84
SUPPLY	253	289	268	290
CONSUMPTION	199	218	218	240

POTASSIUM

STOCKS	1.7 NM	3.8	5	5
IMPORTS	29.4	28.2	23 NF	26
SUPPLY	31.1	32.0	28	31
CONSUMPTION	27.3	28.0	28	31

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TTURKEY DOES NOT EXPORT FERTI
LIZER. BUT, INCREASED PHOSPHAE
PRICES MAY MAKE DEPOSITS ECONOMIC. S AND D DATA, ESPECIALLY FOR
PYOSPHATE, MAY CONTAIN SOME CONVERSION ERRORS.

3. RETAIL FERTILIZER PRICES (NUTRIENT BASIS EQUIVALENT) PER
KG AT GOVERNMENT DEPOTS AS LAST POSTED MAY 23, 1973 ARE:
NITROGEN, 18.6 TO 20 US CENTS; PHOSPHATE, 17 TO 19 CENTS;
POTASSIUM, 11.6 CENTS. PRICE INCREASES FOR 1974 COULD WELL
BE HELD TO 25 PERCENT THROUGH INCREASED SUBSIDY.

MACOMBER

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